

The 2023 tax season is underway - the deadline to file for the regular tax season is Tuesday, April 18, 2023. Kindly refer to this document for important information and resources.

Help With Your Federal Taxes

Office of Rep. Rob Menendez
New Jersey's 8th Congressional District



Congress of the United States
House of Representatives
Washington, DC 20515-3008

Dear Residents of the Eighth Congressional District,

We all know filing taxes can be stressful. Therefore, as tax season quickly approaches, our office wants to make sure you have all of the resources and information you need to file your federal taxes while avoiding common mistakes and potential scams that occur this time of year.

If you have any questions or if we could be of any further assistance with any issues you may be having with the IRS, please contact our Jersey City office at (201) 309-0301. You can also contact us through our [website](#).

We are here to serve you and look forward to hearing from you soon.

Best always,

Rob

How our office can help:

Getting more timely answers to your tax questions

If you are having trouble reaching the IRS to address questions on tax filings, your tax bill, or other tax-related issues, we can assist you.

Addressing bureaucratic logjams like lost or mistaken paperwork

If your paperwork has been lost by the IRS, or you are having problems reaching the right department or person to address a tax issue, we can assist you.

Assisting with issues regarding how the IRS calculated what you owe

If you believe that the IRS has overestimated your tax bill, we can assist in reaching out to the IRS and requesting a review.

Recovering tax refunds

If you have not received your tax refund in a timely manner, we can assist you in recovering your refund.

Setting up a payment plan

If you need a payment plan to assist you in paying your tax bill, we can assist you in coordinating with the IRS.

Small business tax issues

If you are a small business owner, we can assist you with tax issues you may be having with the IRS.

Important IRS Tax Season Resources

IRS Resources:

The official website of the IRS (www.irs.gov) provides resources for:

- [Filing Your Taxes for Free](#)
- [Getting your Refund Status](#)
- [Accessing your IRS Online Account](#)
- [Getting your Tax Record](#)
- [Applying for an Employer ID Number \(EIN\)](#)
- [Making Payments](#)
- [Findings Forms & Instructions](#)
- [Answers to Your Tax Questions](#)

Taxpayer Advocate Service Resources:

The Taxpayer Advocate Service (TAS) shares [tips to help taxpayers](#) prepare tax returns and avoid issues that cause return processing errors and refund delays. These tips include:

- Use your year-end income statements (e.g., Form W-2/1099), not your pay stub, to verify your income.
- Double check that your information is correct for yourself and your dependents.
- Check for all credits and deductions for which you may be eligible.
- Attach all forms and schedules before you submit your return.
- If E-filing, be aware of tax software that imports prior year data automatically.

If you are filing a tax return for the first time, or the first time in many years, there are [resources](#) to help:

- Students and recent graduates working for the first time;
- Gig workers who did not previously need to file;
- Adults returning to the workforce after long periods of unemployment;
- New military recruits who may be getting their first paychecks;
- Retirees returning to work to supplement their income;
- People taking on filing responsibilities after a spouse's death;
- People filing only to claim refundable credits;
- Individuals who believe like they are not responsible for a debt owed by their spouse or ex-spouse;
- Injured Spouse Claims; and
- Innocent Spouse Relief.

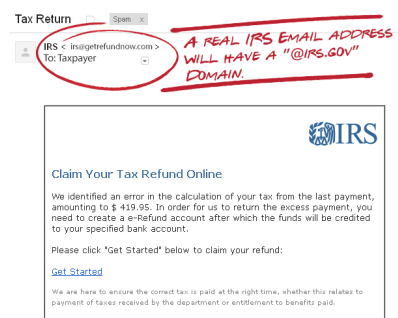
For news, tips, and updates from the Taxpayer Advocate Service, there are additional resources:

- [Small business filing and recordkeeping requirements](#)
- [Reporting tax problems that affect more than one taxpayer through the Systemic Advocacy Management System \(SAMS\)](#)
- [Taxpayer bill of rights](#)
- [The National Taxpayer Advocate blog](#)

Potential scams and fraud attempts

Avoid fraud attempts and scams by reviewing the following tips and guidance:

- Check the caller ID on your phone to see if a call is marked “spam risk”- if so, it is not a call from the IRS.
- The IRS does not call to demand immediate payment.
- The IRS does not threaten you with arrest.
- The IRS does not call about taxes owed before a statement is received in the mail.
- The IRS does not require you to pay your taxes with prepaid debit cards, wire transfers, money orders, gift cards, cryptocurrency, or credit/debit cards.
- Always be suspect of unexpected emails or texts.
- Attachments or links may have malicious code that could infect your computer or compromise your personal information.
- Be aware of who you give your personal or financial information to, even if you think an email is from your bank or financial institution. Fraudsters make emails and texts look legitimate.
- Transferring funds to an unverified recipient can be a potential fraudster.
- Remember that secure websites have “https://” in the web address.



If you think you are being targeted as part of a scam or fraud, please take the following steps:

- If you receive a suspicious email or text that claims to be from the IRS, forward the email or send a screenshot of the text to phishing@irs.gov.
- If you need to report suspected tax fraud activity, report identify theft, or other types of fraud or scams related to your taxes, please click on this [link](#).

Key Guidance from the IRS Criminal Investigation Division

- Phishing scams are still prevalent. If you receive an unsolicited email, don't enter your personal information or click links. Scammers have become much more sophisticated, and emails and texts may look legitimate.
- Charity fraud takes place when an organization falsely claims to be a nonprofit organization or misappropriates funds intended for a charity. Before you donate, ensure an organization is legitimate. Verify an organization's tax exempt status before you donate goods, services, or money.
- Fraudsters prey on U.S. taxpayers who may owe a debt to the IRS. Be wary of advertisers who say they can settle your tax debt for pennies on the dollar. If you have a debt to the IRS, reach out to the IRS directly to determine your options.
- Research your tax preparer. You're ultimately responsible for your tax bill so choose a tax preparer wisely.
- Seniors should be on high alert. Criminals often target senior citizens through the use of predatory phone calls and emails, as well as phishing attempts.